



CITY OF SOMERVILLE, MASSACHUSETTS BOARD OF ASSESSORS

41A Property Tax Deferral Instructions for FY 2022

Dear Taxpayer:

The board of assessors will again be accepting applications for 41A tax deferral applications for the current fiscal year 2022.

Before you get started we would like to inform you about the requirements:

- You must be 65 or older on July 1, 2021;
- You must have owned & occupied your home for 5 years prior July 1, 2021;
- You need to have lived in Massachusetts for at least 10 years;
- Your gross income of 2020 cannot be more than \$86,000; and
- R.E. taxes deferred in FY 22 will gain interest at a rate of 2.5 percent.

Together with your application we need the following documents:

- An ID that shows your birthdate: driver's license, passport, or birth certificate;
- 2020 Federal Income Tax Return and 2020 Massachusetts Income Tax return with all schedules, including circuit break if applicable;
- All 2020 Form 1099's and/or tax return schedules/worksheets that identify gross income;
- All 2020 W-2 forms.

If your property is held by a trust we need a copy of the entire trust document, and a copy of the schedule of Beneficiaries.

Please note that if you have a mortgage on your home that bank needs to agree to the deferral before the Board of Assessors can decide on the deferral application.

The Board of Assessors can only consider timely filed applications. **Applications must be filed with the board of assessors by Friday April 1, 2022, 1230 pm.**

The assessor's office will not consider or hold incomplete applications.

If you have any questions, please visit us at City Hall: Monday-Wednesday 8:30am - 4:30pm, Thursday 8:30am – 7:30 pm, and Friday 8:30am – 12:30 pm. You can also contact the assessor's office at 617-625-6600 ext. 3100 or email us at assessing@somervillema.gov

With kind regards,

Assessor's Office